Chapter Management

CAPT Frank Michael, USN (Ret)
Senior Director, Council and Chapter Affairs

Dena Kilgore, CAE
Program Director, Council and Chapter Affairs

Victoria Twyne
Program Manager, Council and Chapter Affairs

MOAA®
Military Officers Association of America
Chapter Effectiveness

Legislative Advocacy
Impactful Community Service
Membership Growth

Chapter Health
Recruiting and Retention
Program Updates

• Online Dues Portal
  – CIO Team continuing to work with current contractor. Will update as soon as possible.

• AMS Cutover to begin 31 March
  – CM and NRT will be unavailable leaders until on or about 22 April

• National awards judging complete
  – Comm awards presented during our AiA week CP Seminar. LOEs presented to those that want to accept at that venue.

• Planning a chapter survey
Chapter Overview

The healthy chapter:
• Defined purpose/mission
• Legislative advocacy/engagement
• Impactful community service
• Membership growth

How we can measure accomplishment and sustainability:
• Use of committee module/other electronic tools
• Up-to-date leadership roster
• Recruiting and retention statistics
• Use of sponsorship and grant programs
• National and Council engagement
• Training involvement and collaborative engagement
New Leader’s Checklist

• Review the Policies and Procedures Guide in its entirety
• Familiarize yourself with the contents of the council and chapter page of the moaa.org website
• Be a national MOAA member (or the spouse of a national MOAA member)
• Be opted-in to receive communications from national MOAA, to include The MOAA Newsletter and C&C content
• Ensure the electronic roster is updated with new affiliate officers upon installation
• Ask for a New President’s package from national MOAA if you haven’t received one
• Watch the recordings of the last Leaders’ Workshop, Roundtables, and other leader training opportunities
## Affiliate Checklist - P1

1. Have a stated and known mission
2. Officer familiarity with the MOAA website and Policies and Procedures Guide
3. Subscribe to *The MOAA Newsletter*
4. Proactively address renewals
5. Have a succession plan
6. Regularly submit awards nominations
7. Update Committee Module roster and check Near Real Time Report monthly
<table>
<thead>
<tr>
<th>Task</th>
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<tbody>
<tr>
<td>Use existing technology/tools</td>
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<tr>
<td>Publish a newsletter (print or electronic)</td>
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<tr>
<td>Have a well-maintained website and social media presence</td>
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<tr>
<td>Regularly engage with Council and national Council and Chapter Affairs</td>
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<tr>
<td>Regularly attend offered training</td>
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<tr>
<td>Engage in community service and advocacy activities</td>
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<tr>
<td>Engage with other Military and Veteran Service Organizations/Coalitions/Chamber of Commerce</td>
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</tbody>
</table>
Membership

Membership Numbers

– National members: 363,000
– Chapter members: 35,325
– Virtual chapter members: 1,057

Average Age

– National members: 67
– Chapter members: 75

Chapter Growth (year-end 2023 to Q1 2024)

– Geographic chapters: 35,325 to 35,355
– Virtual chapters: 1,057 to 1,072
Virtual Chapters

MOAA has 6 virtual chapters open to MOAA national members

• Uniformed Services Nurse Advocates Virtual Chapter
• Surviving Spouses Virtual Chapter
• United States Public Health Service Virtual Chapter
• Chaplains Virtual Chapter
• Judge Advocates Virtual Chapter
• Advocacy for Servicewomen and Military Families Virtual Chapter
Grassroots Advocacy
Goal: Influence in every congressional district

- Legislative chair/liaison
- Coordinate council and chapter efforts
- Foster relationships with elected officials
- Visit legislators/staffers in home offices
- Participate in the State Legislative Exchange Forum
  - Don Wolfinger
- Keep your chapter members informed and involved
  - Legislative Updates/Alerts in The MOAA Newsletter (weekly)
  - Legislative Action Center (MOAA.quorum.us)
  - Participate in annual advocacy events
- Join virtual chapter(s)
Advocacy in Action 2024 Planning

- Monday, April 15th: Council Leaders Welcome Dinner
- Tuesday, April 16th: AiA Training Day
- Wednesday, April 17th: AiA Hill Day
- Thursday, April 18th: Council President’s Seminar

- AiA will be in-person, with options for virtual meetings before and after the event

- All MOAA members have the opportunity to participate through the Legislative Action Center: calling, emailing, and sending letters to their Members of Congress on the issues

- https://www.moaa.org/content/take-action/advocacy-in-action-2024/
Tools and Resources: Recruiting and Retention

PROGRAMMING
- Electronic Support Messaging
- Post Cards/Revitalization
- Opt-in messages
- Visit request form

OUTREACH
- Grants and Sponsorships
- Chapter Gear/Logos
- Videos
  - Join Your MOAA Chapter Today
  - Stakeholder’s Report
- RAD/Recruiting Kits
- White Label Newsletter

RECOGNITION
- Leadership Awards
- Organizational Awards
- Ceremonies
- Military Officer Magazine and E-newsletter Member Spotlight

TECHNOLOGY
- Committee Module
- Near Real Time Report
- Online Dues
Recruiting Best Practices

• Every member is a recruiter
• Lean into networks, make personal connections
• Create internal recruiting competition
• Use Common Join Form
• Build a recruiting package (invitation letter, current newsletter, membership application)
• Always carry recruiting info
• Provide online join option, use online dues program
• Have a website or web presence
• Use social media, personalize membership
• Conduct meetings at different venues and times
• Connect with base retirement services office or transition center
• Follow up after initial contact and/or first meeting
Information Sharing

• Association Management System Update
  – March 31: Cut over date. Anticipate no access through on or about 22 April

• Expanded Member Data Sharing
  – Opt-in Joins Prior to October 2018
  – Post AMS transition
  – Restrictions and safeguards
Committee Module Enhancements

• More requested data fields
• Near Real Time (NRT) date range increase
• Chapter roster and NRT match
• New Terminology Used:
  – Member (Read Only) / Manager (Updating Privileges)
• Managers can:
  • Add members, place end date (to deactivate members)
  • update Meeting Information
Generational Recruiting and Retention

• Be relevant and relatable
  – Meaningful connection
  – Welcoming environment

• Younger generation wants to DO something; make a difference
  – WIIFM?
  – Consult with target demographic
  – Ask for their ideas and their voices
Partnerships Update

• Carry The Load
  – Honor fallen servicemember, veteran, or first responder
  – Five march relay routes across 48 states converging Memorial Day Weekend
  – Opportunity to participate in national cemetery visits
  – https://www.carrytheload.org/

• Our Community Salutes
  – Recognition ceremonies for high school enlistees and families
  – Opportunity to participate and/or host a table
  – https://www.ourcommunitysalutes.org/communities-home
Inclusion and Retention

• Provide a welcoming, diverse environment
  – Integrate new members quickly
  – Remember that first impressions are key
  – Assign sponsors/buddies for new members
  – Considering timing for meetings

• Survey members
  – Learn their interests
  – Incorporate into planning
  – Follow-up

• Develop meaningful programming
  – Current events, interests
  – Mission
  – Community outreach
  – Social/family friendly

• Make a connection
  – Communicate regularly
  • Newsletter
  • Calling tree
  • New member packet
  • Social media
  • Reach out to other VSOs
Leadership Succession Tips

- Review present bylaws/fill critical positions first
- Review current term limits
- Consider “fleet up” model with a deep bench
- Generate interest in leadership positions well before nominations
- Identify potential candidates during normal course of business
- Groom and mentor potential leaders and get them involved in a chapter committee
- Be inclusive and proactive in including surviving spouse members and spouses
- Develop a chapter operations handbook
- Have an active awards/recognition program
Revenue Generation

- Recruiting Incentives
- Community Grants and Sponsorships
- AMBA Advertising
- MOAA Vacations Rebate
- Newsletter Advertising
- Local Retail Sponsors
- Auctions
- Golf Tournaments
MOAA STORE

WELCOME TO THE
MOAA STORE!

BE SURE TO CHECK OUT THE CLOSEOUT SECTION FOR LAST CHANCE ITEMS!
Chapter Communications

- MOAA Electronic Newsletter
- White Label Newsletter
- Military Officer Magazine
- State-specific joint messages
- Electronic Support Messages
- Post Cards
<table>
<thead>
<tr>
<th>Council and Chapter Awards</th>
<th>Council and Chapter Recruiting and Membership</th>
<th>Council and Chapter Administration</th>
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<tbody>
<tr>
<td>Learn about the many honors available to MOAA councils and chapters, and their members.</td>
<td>Resources for chapter leaders to grow and maintain their membership rolls.</td>
<td>Forms, links, downloads, and other materials.</td>
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<tr>
<td>READ MORE</td>
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<tr>
<th>Council and Chapter Communications</th>
<th>Council and Chapter Community Involvement</th>
<th>Council and Chapter Training Materials and Opportunities</th>
</tr>
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<tr>
<td>Resources for chapter leaders to grow and maintain their membership rolls.</td>
<td>Resources for chapter leaders to reach out to their communities.</td>
<td>Leaders and members alike have many learning tools at their disposal.</td>
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2024 Leader Training Workshops

Leadership Seminar
Orlando, FL
January 25-27
FL, Other C&C by invitation

Virtual Workshop
New Leaders
March 27
Focused on New Chapter Leaders

South Workshop
Greenville, SC
May 17-18
AL, GA, KY, MS, NC, SC, TN, VA

Virtual Workshop
Experienced Leaders
August 14
Focused on Experienced Leaders

West Workshop - Reno, NV
November 15-16
AK, AZ, CA, HI, ID, MT, NV, OR, UT, WA, WY
## 2024 Roundtable Schedule

<table>
<thead>
<tr>
<th>Month</th>
<th>Event</th>
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<tr>
<td>January 18</td>
<td>Compliance and Legal Topics</td>
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<tr>
<td>February 29</td>
<td>Committee Module</td>
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<td>March 28</td>
<td>Advocacy in Action</td>
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<td>April 25</td>
<td>Marketing</td>
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<td>May 23</td>
<td>Individual Awards Program</td>
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<td>June 27</td>
<td>Generational Recruiting</td>
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<td>July 25</td>
<td>Chapter Health Update</td>
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<tr>
<td>August 29</td>
<td>Council/Chapter Visit Program</td>
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<td>September 26</td>
<td>TBD</td>
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<tr>
<td>October 24</td>
<td>Community Outreach</td>
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<tr>
<td>November 21</td>
<td>MOAA Annual Awards</td>
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<tr>
<td>December 19</td>
<td>2024 review 2025 preview</td>
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* Adjusted from 4th Thursday to Avoid Conflict
Resources

• [www.moaa.org](http://www.moaa.org)
  – C&C Policies and Procedures Guide
  – Leaders Workbook
  – Webinars
  – Electronic Newsletter

• [chapters@moaa.org](mailto:chapters@moaa.org)

• 1-800-234-MOAA
Discussion